

Task Statements

1.	Plan the work of Case Record Technicians and other clerical staff engaged in processing, maintaining and controlling inmate, youthful offender and parolee records to ensure staff work is accurate and routed to the appropriate area by utilizing computer/manual tracking systems, desk reference manuals, and communication skills on an on-going basis per Departmental policy.
2.	Organize the work of Case Records Technicians and other clerical staff engaged in processing, maintaining and controlling inmate, youthful offender and parolee records to ensure staff work is accurate and routed to the appropriate area by utilizing computer manual tracking systems, desk reference manuals, and communication skills on an on going basis per Departmental policy.
3.	Direct the work of the Case Records Technicians and other clerical staff engaged in processing, maintaining and controlling inmate, youthful offender and parolee records to ensure staff work is accurate and routed to the appropriate area by utilizing computer manual tracking systems, desk reference manuals, and communication skills on an on going basis per Departmental policy.
4.	Interview applicants in order to maintain the continuity of the office utilizing advertising, certification lists and personnel staff on an as needed basis.
5.	Select staff via the interview process in order to maintain the continuity of the office utilizing certification lists and personnel staff on an as needed basis.
6.	Evaluate the training needs of Case Records Technicians and other clerical staff in order to ensure staff is equipped with the skills, knowledge and reference materials/tools needed to perform their assigned duties by utilizing computer/manual applications, on an on-going basis.
7.	Evaluate the work performance of Case Records Technicians and other clerical staff engaged in processing, maintaining and controlling inmate, youthful offender and parolee records to ensure staff work is accurate and routed to the appropriate area in a timely manner by utilizing computer/manual tracking systems, desk reference manuals, and communication skills on an on-going basis.
8.	Initiate employee Progressive Disciplinary action in order to correct/improve performance/behavior or issue of substandard performance by utilizing Employee Assistance Program (EAP), Individual Development Plan (IDP), corrective memos, in accordance with Title 15 and the rules governing civil service, as needed.
9.	Assign work to Case Records Technicians and other clerical staff engaged in processing, maintaining and controlling inmate, youthful offender and parolee records in order ensure accurate and timely processing of assigned duties by utilizing computer/manual tracking systems, desk reference manuals and communication skills on a daily basis.
10.	Represent the office in management staff meetings to provide and receive technical expertise/information by utilizing communication/writing skills, policies, procedures, knowledge, memorandums, laws, rules and regulations as needed.
11.	Collect data (i.e. statistical reports) for management to accurately reflect the timely processing of a multitude of documents by utilizing computer/manual tracking system according to Departmental policy/office procedures.

Tasks highlighted in bold text are not currently on the SPB classification specification

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12.	Compile data (i.e. statistical reports) for management to accurately reflect the timely processing of a multitude of documents by utilizing computer/manual tracking system according to Departmental policy/office procedures.
13.	Summarize data (i.e. statistical reports) for management to accurately reflect the timely processing of a multitude of documents by utilizing computer/manual tracking system according to Departmental policy/office procedures.
14.	Assist in workload projections for management to accurately reflect the timely processing of a multitude of assigned duties by utilizing computer/manual tracking system according to Departmental policy/office procedures.
15.	Review operating procedures for management to reflect changes/additions resulting from legislative/Departmental policy to ensure appropriate procedures are followed without disruption to workload utilizing computer/manual tracking system and reference material as needed.
16.	Evaluate operating procedures for management to reflect changes/additions resulting from legislative/Departmental policy to ensure appropriate procedures are followed without disruption to workload utilizing computer/manual tracking system and reference material as needed.
17.	Recommend operating procedures for management to reflect changes/additions resulting from legislative/Departmental policy to ensure appropriate procedures are followed without disruption to workload utilizing computer/manual tracking system and reference material as needed.
18.	Provide training to Case Records Technicians and other clerical staff to ensure they are equipped with the skills, knowledge and reference materials/tools needed to perform their assigned duties by utilizing computer/manual applications on an on-going basis.
19.	Maintain supervisor's work files (e.g., leave requests, performance reviews, time records) for Case Records Technicians and other clerical staff in order to maintain accurate records utilizing written communication, organizational skills and computer applications on a daily basis.
20.	Complete probationary reports for Case Records Technicians and other clerical staff in order to maintain accurate records utilizing written communication, organizational skills and computer applications within required timeframes.
21.	Complete annual performance reports for Case Records Technicians and other clerical staff in order to maintain accurate records utilizing written communication, organizational skills and computer applications within required timeframes.
22.	Provide cross-training to Case Records Technicians and other clerical staff to ensure compliance with operational needs and to eliminate/minimize backlog utilizing current desk procedures as necessary.
23.	Act as liaison for Records to respond or initiate inquiries from and to Departmental staff and stakeholders requesting confidential information to ensure public safety based on laws, rules, regulations and policies of the department on a daily basis.

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24.	Participate as a member of a task force or work group for Records evaluating operations or procedures utilizing reference material, manuals, desk procedures, computer skills and communication skills as needed.
25.	Perform the more difficult policy and procedural changes (i.e., special projects) utilizing reference material, manuals, desk procedures, computer skills and communication skills as required by management.
26.	Conduct meetings with staff in order to disseminate information, review memos and update procedures to ensure appropriate procedures are followed without disruption to workload utilizing minute taking and communication skills on a regular basis.
27.	Supervise inmates or youthful offenders to ensure safety and security of the institution/facility utilizing observation techniques as needed.
28.	Utilize in-house automated systems in order to ensure proper housing and release of inmates/youthful offenders utilizing various systems (e.g., Offender Based Information System, Automated Release Date Tracking System, Distributed Data Processing System, Automated Transfer System, Live Scan, Case Records Automated File Tracking System, Revocation Scheduling Tracking System, and California Law Enforcement Telecommunications System) on a daily basis.
29.	Provide back-up to Supervising Case Records Technicians/Case Records technicians to eliminate/minimize backlog utilizing current desk procedures and cross training as necessary.
30.	Schedule inmate, youthful offender and parolee records reviews to comply with requests from Department of Justice, audits, etc. utilizing automated/manual systems as requested.
31.	Maintain integrity and uniformity of the inmate, youthful offender and parolee records standardized filing system within the File Room utilizing automated/manual systems in accordance with security and confidentiality procedures and policies.
32.	Audit/generate reports utilizing automated/manual systems to provide information to resolve discrepancies of inmates/youthful offenders/parolees records to ensure the timely processing per Departmental policy/office procedures on an as needed basis.